HOW TO UPLOAD AND SHARE DOCUMENTS IN CHARM

- 1. Log into your <u>CharmHealth account</u>.
- 2. Click on the DOCUMENTS icon on your homepage.



3. Click on the UPLOAD button.

		SEND MESSAGE SHARE SECTIONS
Timeline Clinical Summary	Upload	
 Messages Documents 	FOLDERS 🛨	
 Questionnaire (1) Visit Summary Visit Summary Medications Supplements Labs Images 	Shared with Me Shared by Me	
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4. Select the file from your computer that you want to upload and click on OPEN.

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LAB RESULTS	Today at 12:55 PM		Folder
2022_02_01_Thyroid, CBC, Vitamin D_LAST NAME, FIRST NAME	Today at 12:53 PM	317 KB	PDF Docum
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5. Click the UPLOAD AND SHARE button. (If you just click upload, I will not be able to see the file you have uploaded.)

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6. Select to SHARE TO CARE MEMBER and in the 'To' field select Dr. Clair Hamilton.

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		Share

7. Click on the SHARE button.

Now you have successfully uploaded and shared your document so that I can review it.

HELPFUL TIPS

- Focus on sharing lab results from the previous 12 months.
- If you have autoimmune or infection testing (antibodies, lyme tests, ANA panels, etc.) please provide the most recent testing even if it's several years old.
- Please title your documents appropriately. I spend a LOT of time reviewing patient documents and having this task taken care of makes a big difference. Consider the following document naming strategy: 'YYYY_MM_DD_NAME OF DOCUMENT_YOUR NAME.
- If you have a lot of labs, imaging, and documents from past work-up you can fill out my RELEASE OF RECORDS forms and I can fax your clinics for your past records on your behalf. My practice fax number is 763 237 8124.